Resume Manager

Resume Manager is an amazing feature available in both Classic and Lightning, which enables you to view candidate resumes in one place.

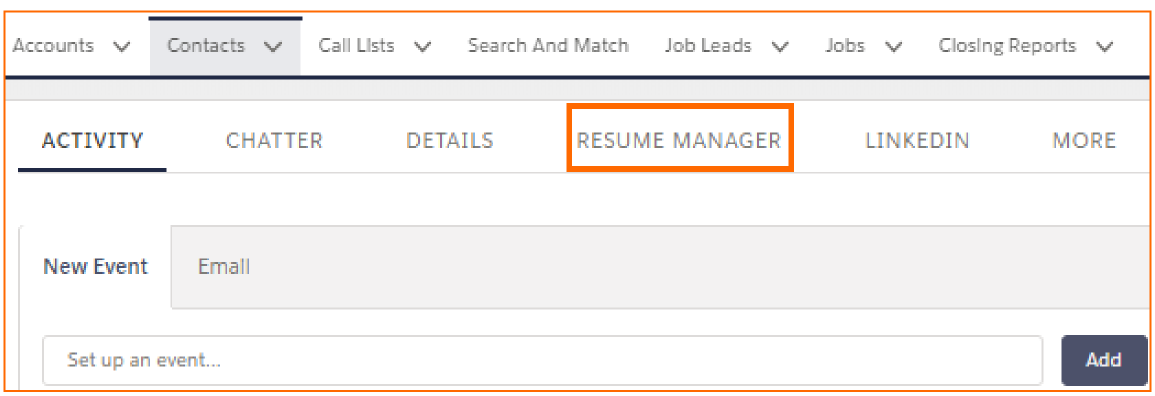
Resume Manager Feature

Resume Manager stores and displays Candidate's resumes. You can view and edit the resume, upload more versions, download, format and share with Clients. Candidate's resumes become available in Resume Manager because of resume parsing.

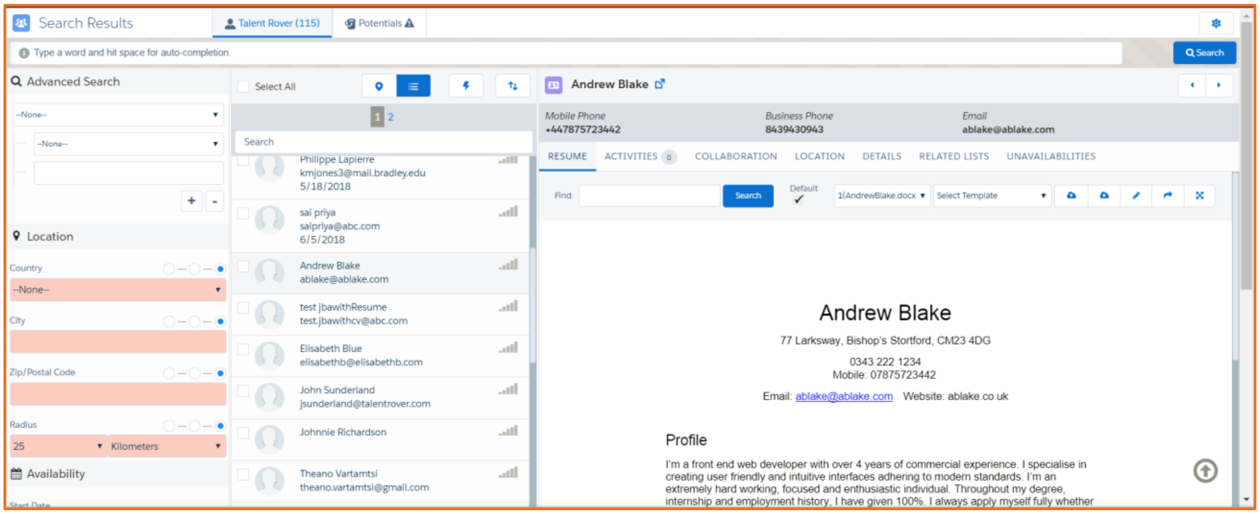
Note: For detailed information on the parsing process, refer to the *Resume Parsing Guide*.

The Resume Manager can be accessed from the Contacts tab, by selecting a Candidate, via Recent Records or Recent Lists. The Contact record is where you can visualize the parsed resume.

Navigate to the *Contact* record, select the **Resume Manager** tab. The Resume Manager displays. Depending on the resolution of your screen, you may need to select the More tab and then select Resume Manager.



You can also view the resume from the Candidate Workspace in Search and Match. There you can manage the same functionalities described below in the *Resume Manager Functionalities* section.



Resume Manager Functionalities

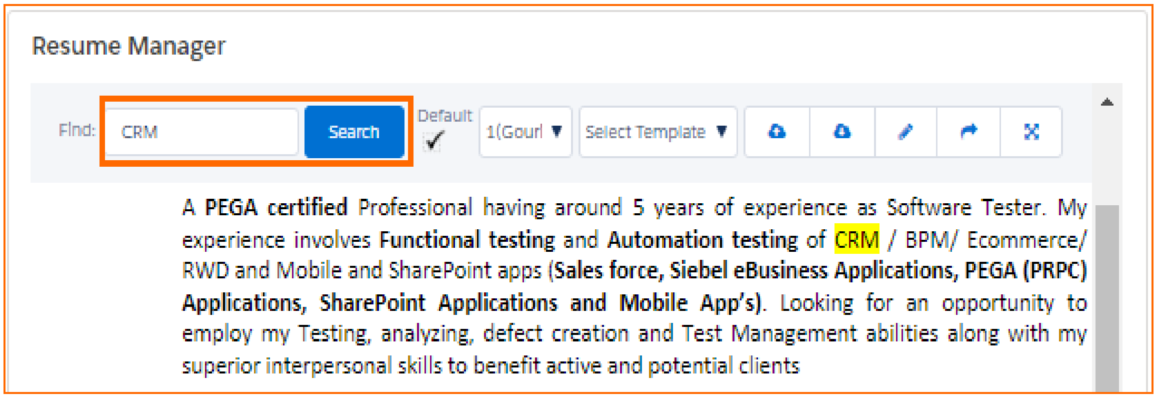
The functionalities of the Resume Manager include:

- Find
- Choose a template
- Upload resume
- Download resume
- Edit resume
- Share
- Full screen

Find

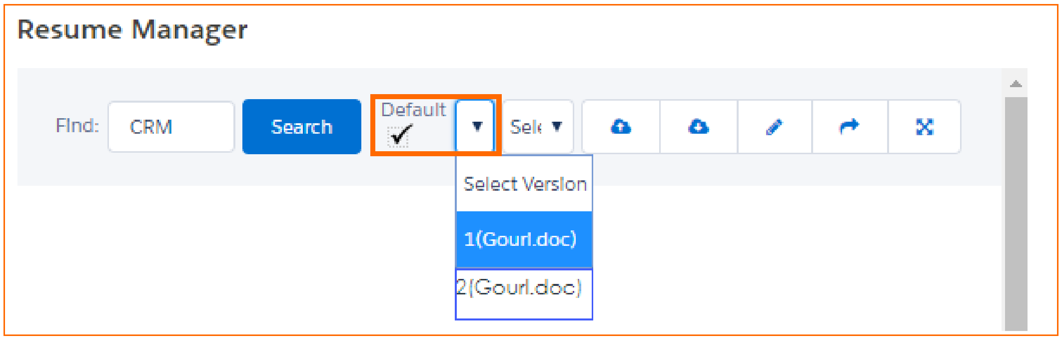
Search for keywords in the resume text. Type the keyword in the **Find** field and click the **Search** button. The keyword highlights in yellow throughout the resume.

Note: Boolean operators are supported.



Default Checkbox / Select Version Dropdown

When additional resumes for a candidate are parsed, the Resume Manager displays the Default (most recently parsed) resume version, and additional resume versions can be viewed from here. Click the **Select Version** drop down to choose the desired version.

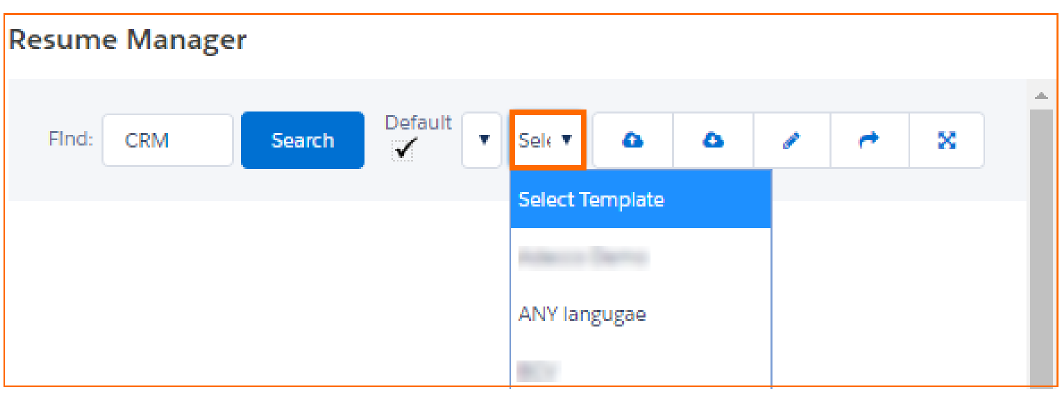


Note: The default flag is enabled automatically for the most recently parsed resume. The significance of the Default flag is that it defines what resume is ‘searchable ‘in Search and Match. You can manually designate a different resume as the Default resume if there is more than one - follow the steps below - but you must be aware that by doing so you are also defining a different ‘searchable’ resume.

1. Navigate to the relevant **Contact** record > **Contact Document Related List**.
2. Select the **Resume File** that is currently the Default resume.
3. Deselect the **Default** checkbox on that record.
4. Navigate to the **Resume File** that you want to designate as Default, mark the **Default** checkbox on that record.

Choose a Template

Choose a template to open the resume editor in that template. Click the **Select Template** drop down and choose a **template** to open. You have the option to save the resume in that template format. This will create a new version of the resume.

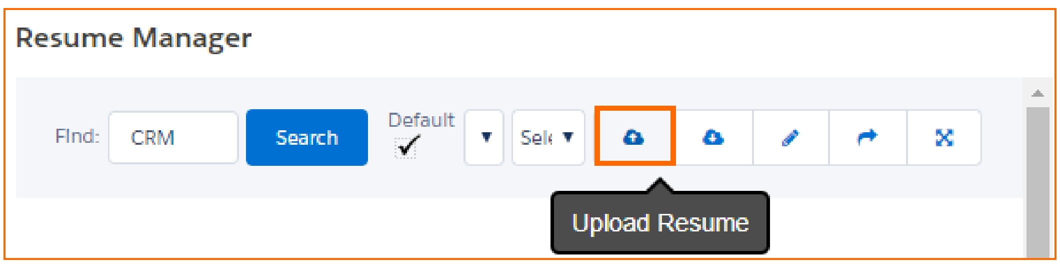


See Create a template for Resume Manager for more information on how to create and add templates to format your resumes.

Admin Note
The ‘Select Template’ dropdown will show all Templates to all users if the Template object is set to ‘Public’ in **Setup** > **Security** > **Sharing Settings** If it is set to ‘Private’ and the sharing is subject to sharing rule, the logged in user will only see the templates he/she has access to according to those rules.

Upload Resume

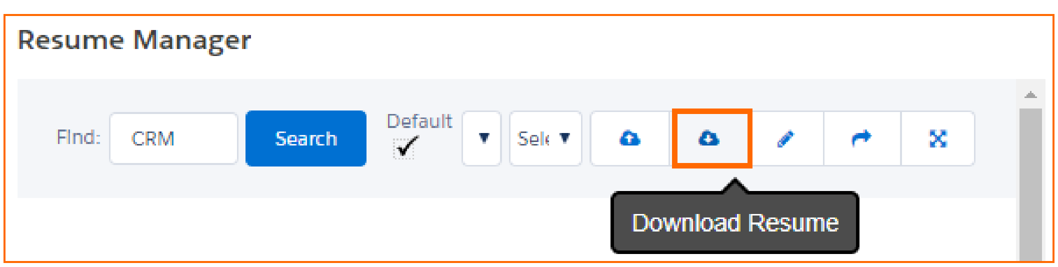
Upload another resume to the candidate profile. Click the **Upload Resume** button. The Update Resume window displays. You can update, paste, or attached a resume. Once you update resume, a new resume version is created (refresh your screen).



Note: When you upload a resume from here, a duplicate check is not performed - it is assumed that the resume uploaded is for the Candidate record you are on while using Resume Manager.

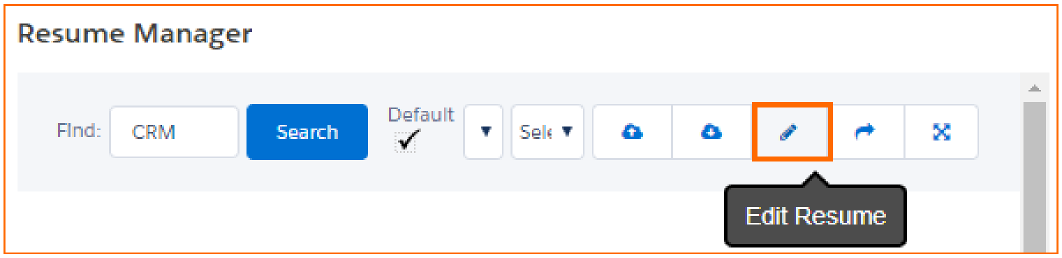
Download Resume

Download the candidate resume to your desktop. Select the **Download Resume** button and **Save** the resume to your file.



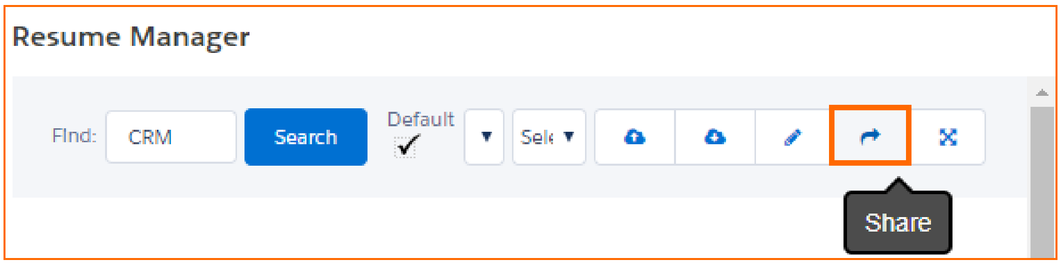
Edit Resume

Open the resume editor to make any changes to the resume. Select the **Edit Resume** button. The Document Editor displays. Make changes to the resume and **Save**. After the changes are made, a new version of the resume is added.



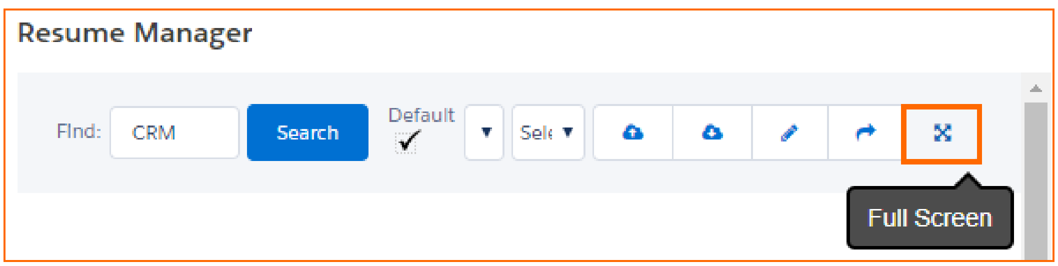
Share Resume

Open another browser tab and send the resume in an email message to your client. Select the **Share** button. The Email template displays. Fill out the Email template and send.



Full Screen

Expand the view to fill the entire screen. Select the **Full Screen** button. The Resume Manager displays in a full screen.



Create a Template for Resume Manager

Create a Basic Template

This section describes how to create a basic formatted resume template, which shows Company Logo + Name + resume Body. Once the Candidate's resume is formatted in Resume Manager using the basic template, only the Candidate's name (not the personal details) and resume body are shown.

To begin, launch Microsoft Word and create a new Word doc. This will be your template: it can have a header and footer, and a logo. Next, add two merge fields to it.

Steps

1. Select **Insert**.
2. Add a Merge Field for the Name, select the **Quick Parts** dropdown.
3. Choose **Field**.
   The *Field* pop up window displays.

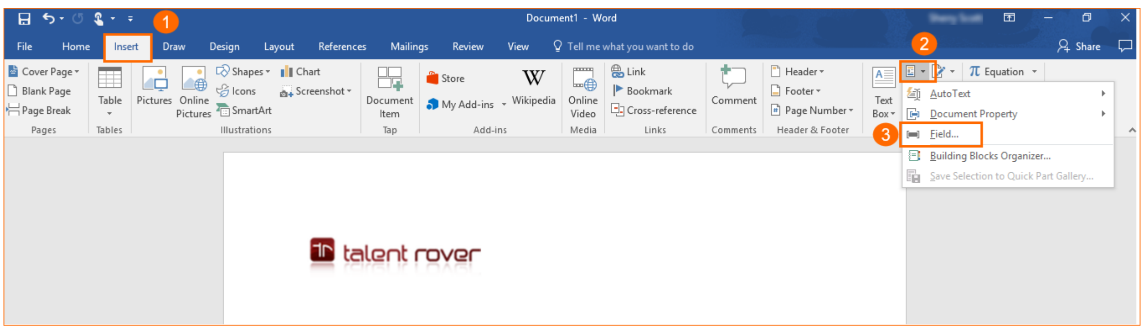


Diagram 1.1 Field Window

4. Scroll down in **Field Names** and select **Merge Field**.
5. Type **Name** (the Name must be in capital letters) in the **Field name.**
6. Click **OK**.

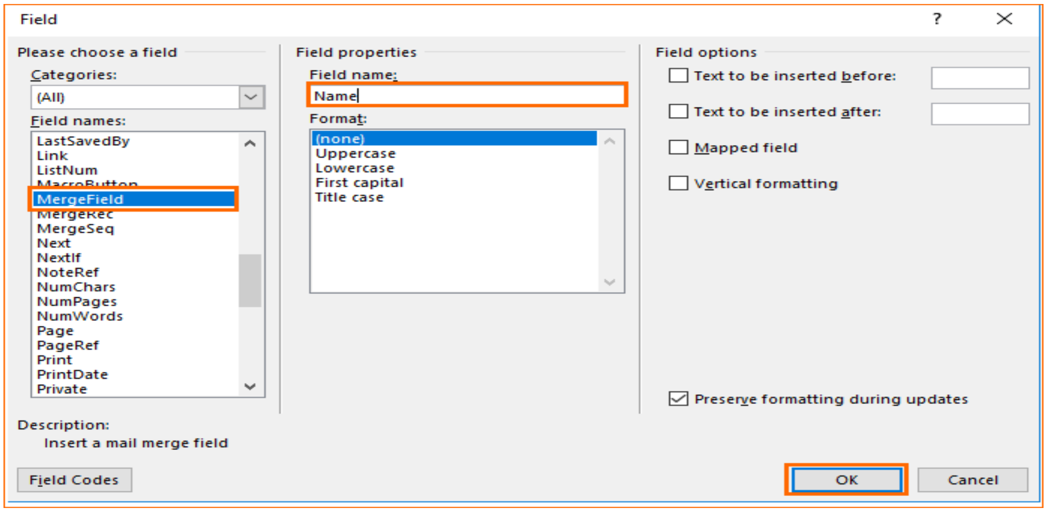


Diagram 1.2 Field Window

7. Add a Merge Field for the body, select the **Quick Parts** dropdown.
8. Scroll down and select **Merge Field**.
9. Type **body** (lower case) in the **Field name**.
10. Click **OK**.

Note: Once the template is saved, you can change the font size and position of Name/ body by selecting Name/body and using the standard Text size and Align commands.'

11. **Save** the template to your file.

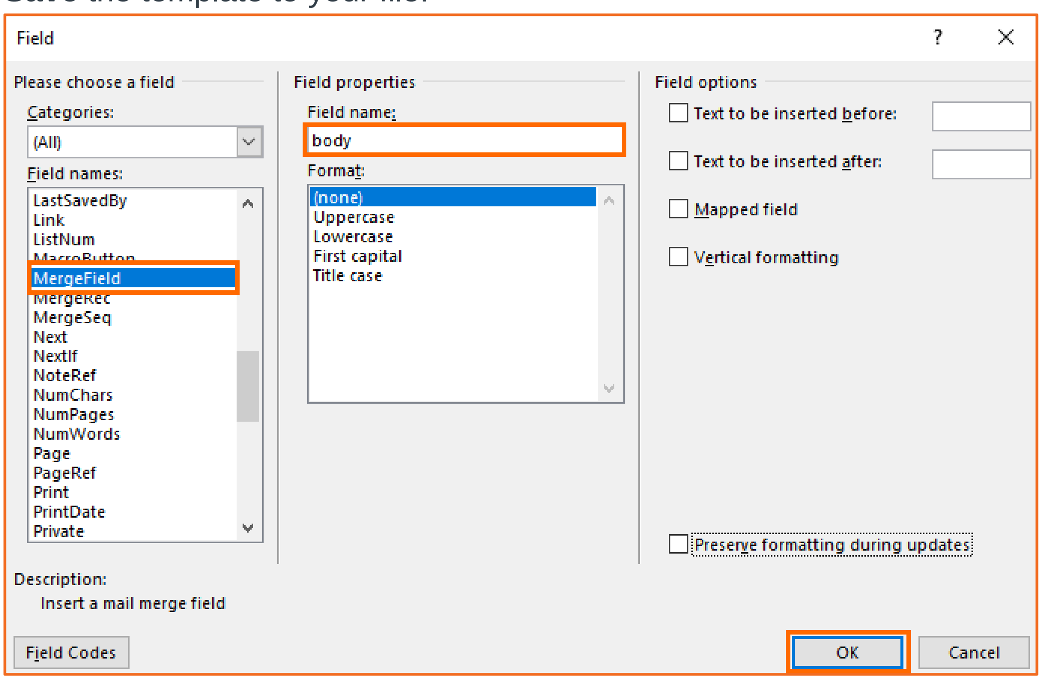
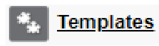


Diagram 1.3 Field window

Upload into the Org

Steps

1. Navigate to Salesforce Classic, select **All Tabs**.
2. Scroll down and select **Templates** 

. Diagram 2.1 Templates
3. Select **New**.
4. Type the name of the template in the **Template Name** field.

Note: This is the name that will display in Resume Manager.

5. Click **Save**.

   The *Basic New Template* screen displays.

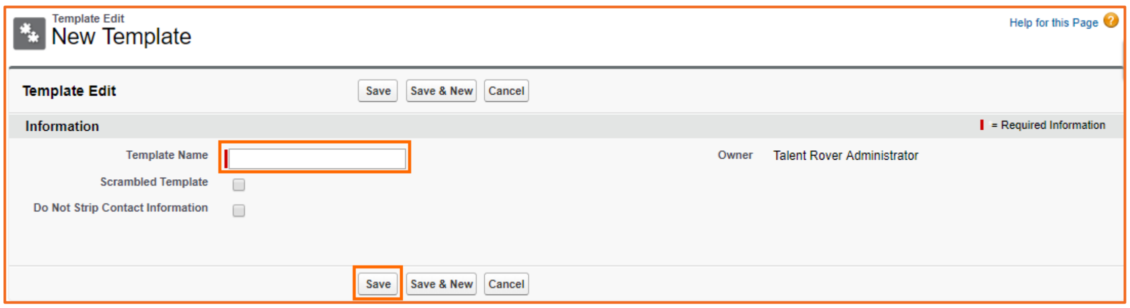


Diagram 2.2 Basic new template

6. Select **Attach File**.

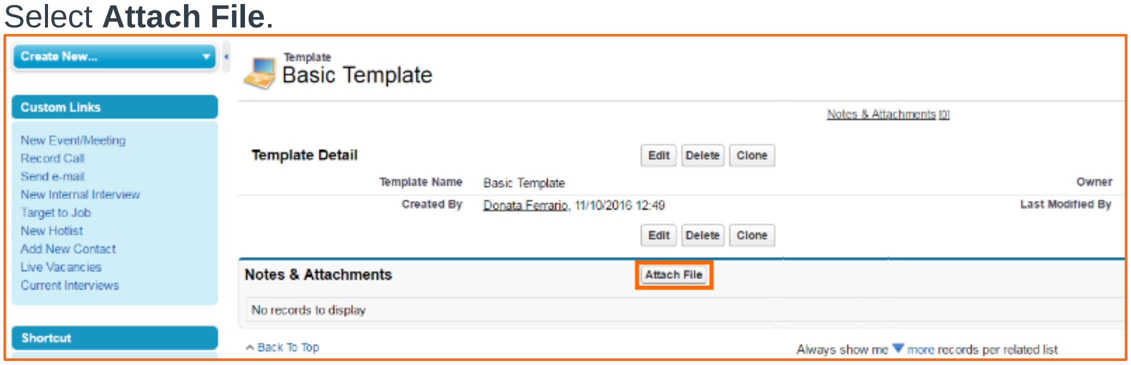


Diagram 2.3 Basic new template

7. Select **Choose File** and choose the template you created.
8. Select **Attach File**.
9. Click **Done**.

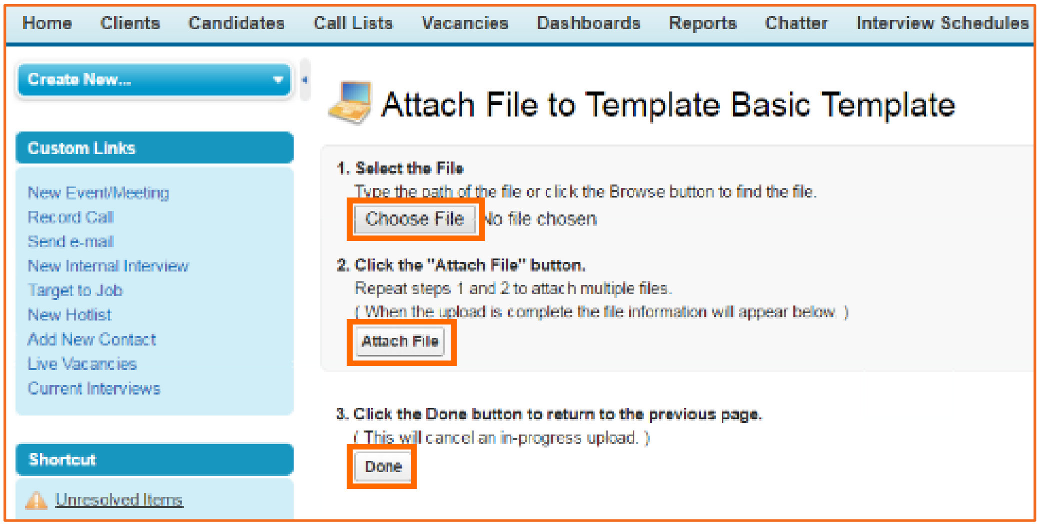


Diagram 2.4 Attach File

View the Template

Navigate to any existing Candidate record and select the **Resume Manager** tab.

Steps

1. Select the Select **Template** drop down.
2. Choose the **template**.
3. Select the **Create Formatted Resume** button.

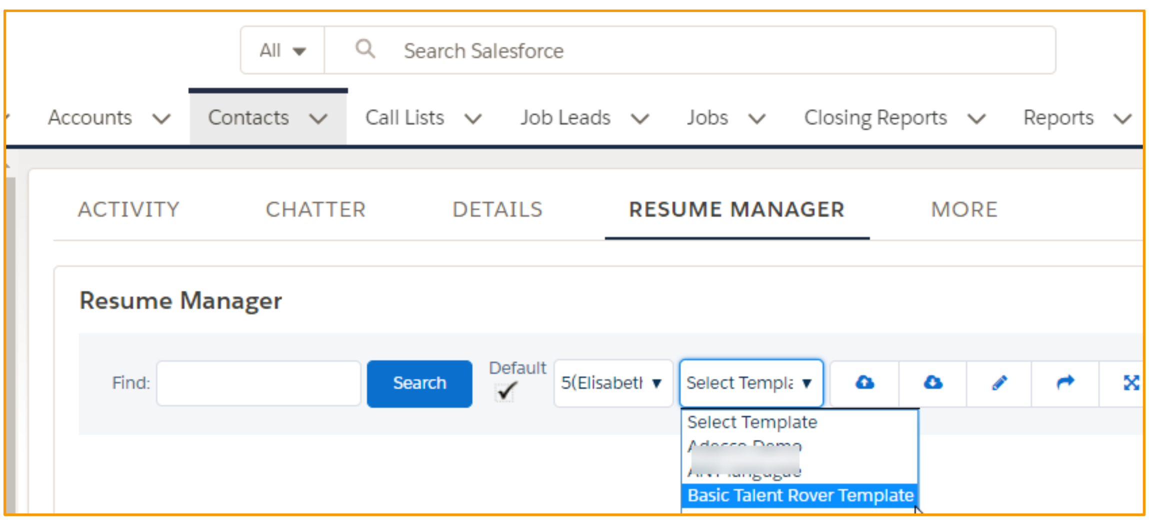


Diagram 3.1 Select Template

The *Formatted Resume* displays.

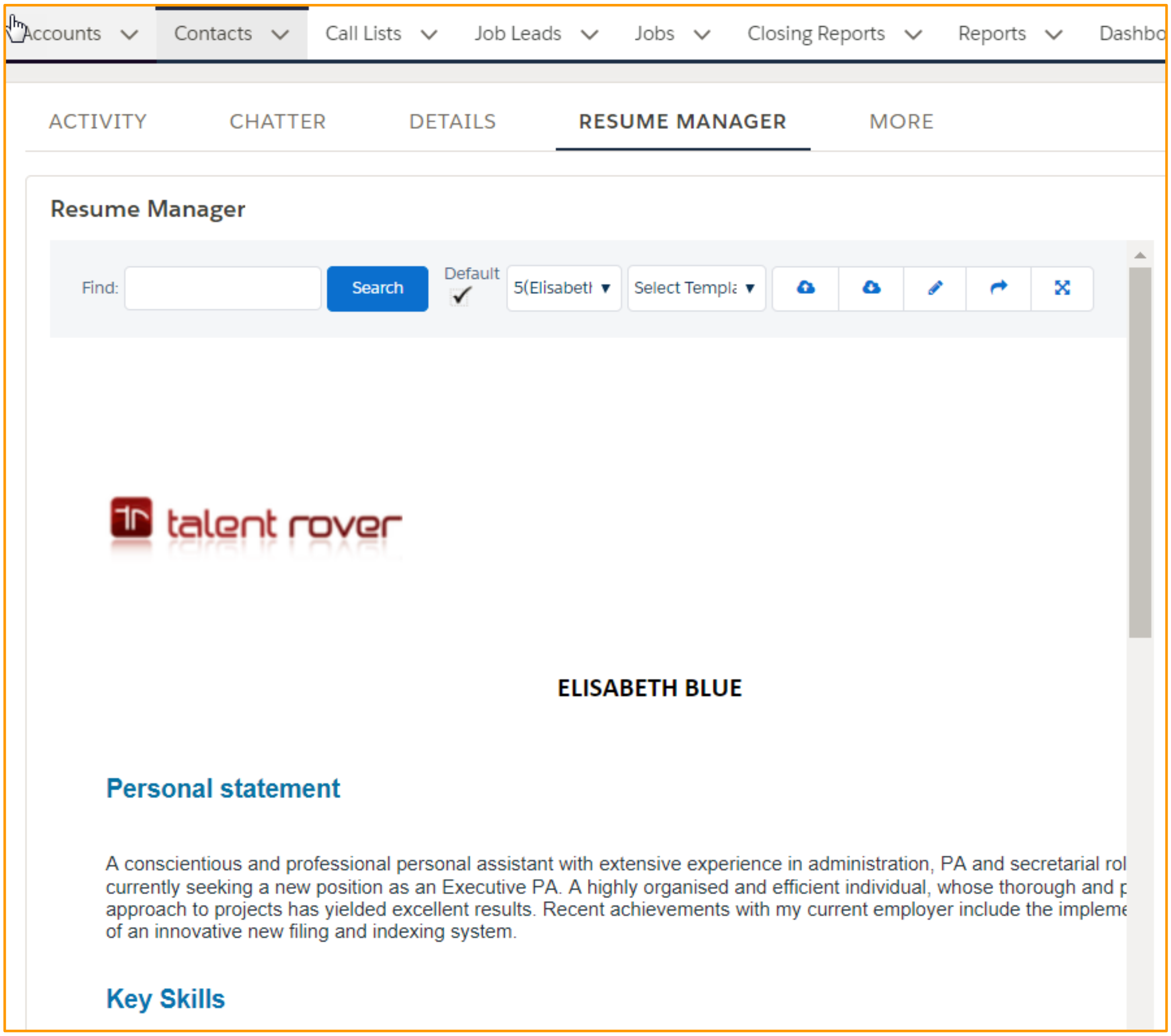
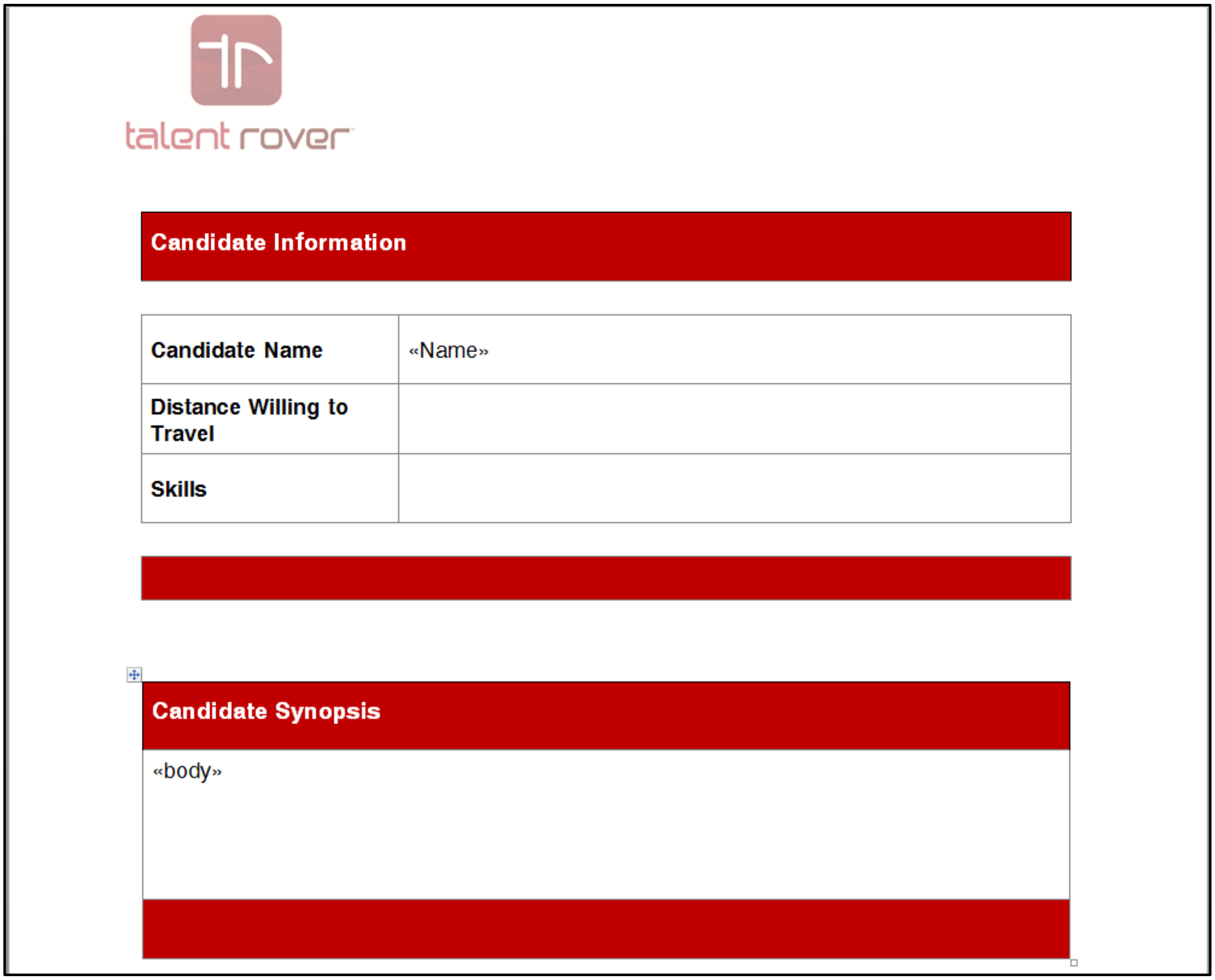


Diagram 4.1 Formatted Resume

Create an Advanced Template

To create an Advanced template, you follow the same process as for the basic template, except that the merge fields that you add to the template reference the fields in the Candidate Contact record.

For example, in your template you want to show some information about the Candidate aside from his/her resume. You can add a ‘form’ like table where it shows the extra information and add the merge fields that will be replaced by the Contact fields value once the template is used. Your template will look initially something like this - notice that the merge fields for Name and body have been added already, following the steps you used above to create a basic template.


talent rover

Candidate Information

Candidate Name	«Name»
Distance Willing to Travel	
Skills	

Candidate Synopsis

«body»

Diagram 5.1 Candidate Information

Now add the merge fields that reference the Contact record fields.

Steps

1. Select **Insert**.
2. Add a Merge Field for the Contact field you want to add, select the **Quick Parts** drop down.
3. Choose **Field**.

The *Field* pop up window displays.

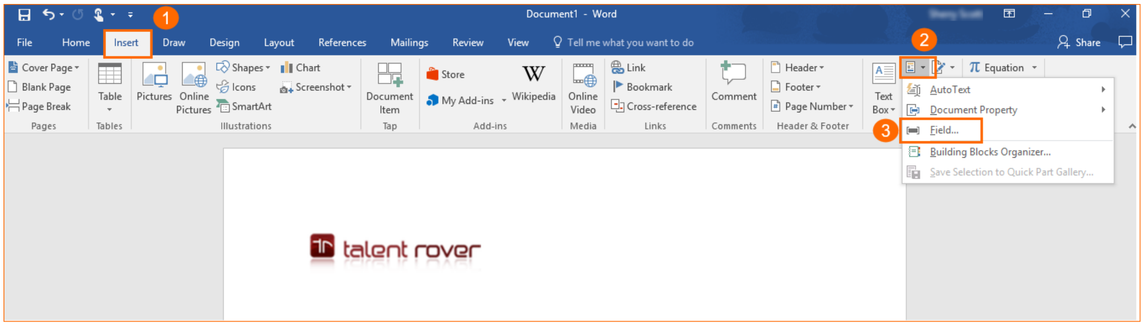


Diagram 6.1 Field Window.

4. Scroll down in **Field Names** and select **Merge Field**.

5. Type the **API name of the Contact field** under **Field name.** For example, if you want ‘Distance Willing to Travel’ to be shown in the formatted template, enter TR1__Distance_willing_to_travel__c here.

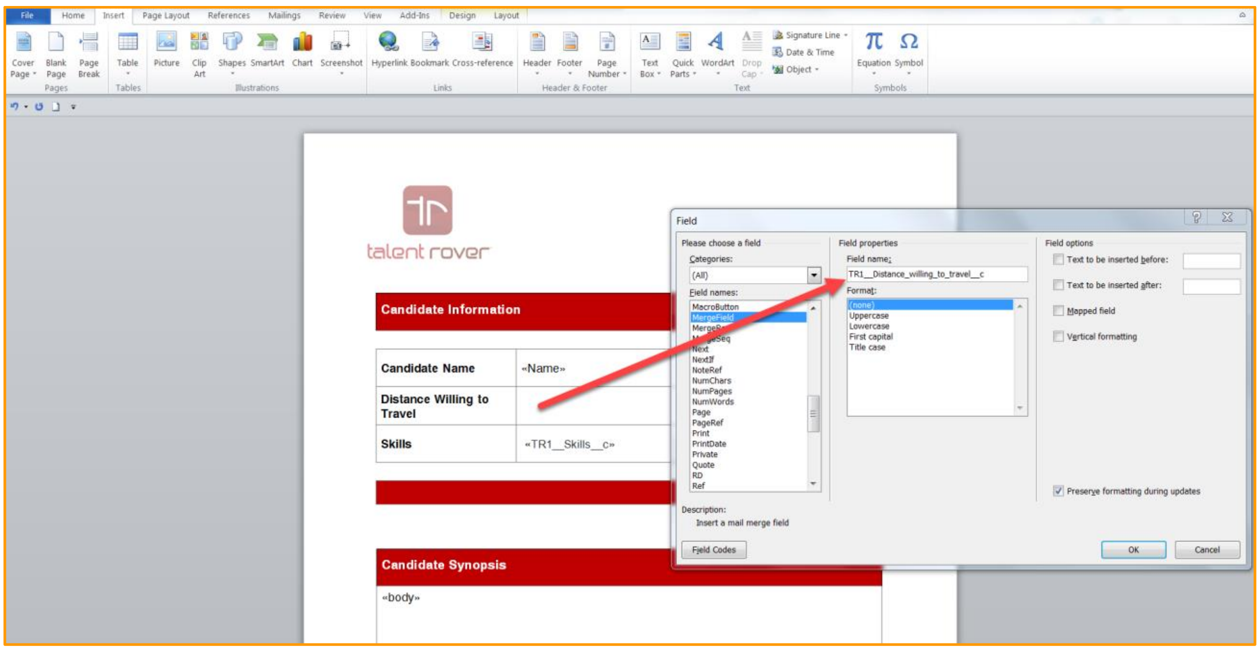


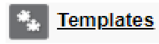
Diagram 6.2 Field Window.

6. Click **OK**.

7. Repeat the same steps for each Contact field/merge field you want to add to your template.

Upload into the Org

Steps

1. Navigate to Salesforce Classic, Select **All Tabs**.
2. Scroll down and select **Templates** 

. Diagram 7.1 Templates.
3. Select **New**.
4. Type the name of the template in the **Template Name** field.
   Note: This is the name that will display in Resume Manager.
5. Click **Save**.

   The Template screen displays.

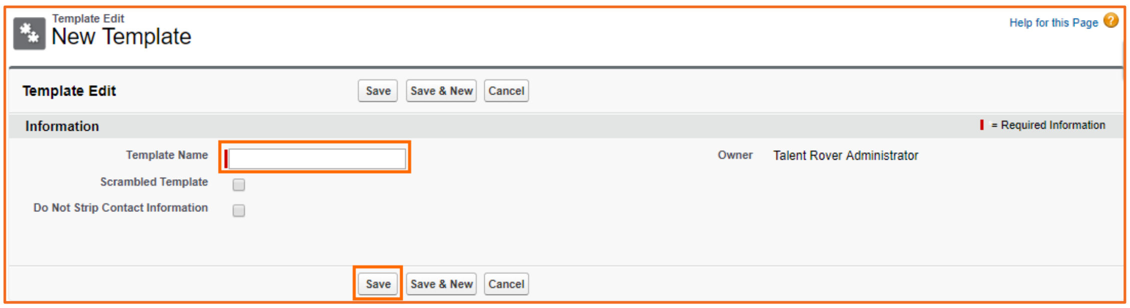


Diagram 8.1 New Template

6. Select **Attach File**.

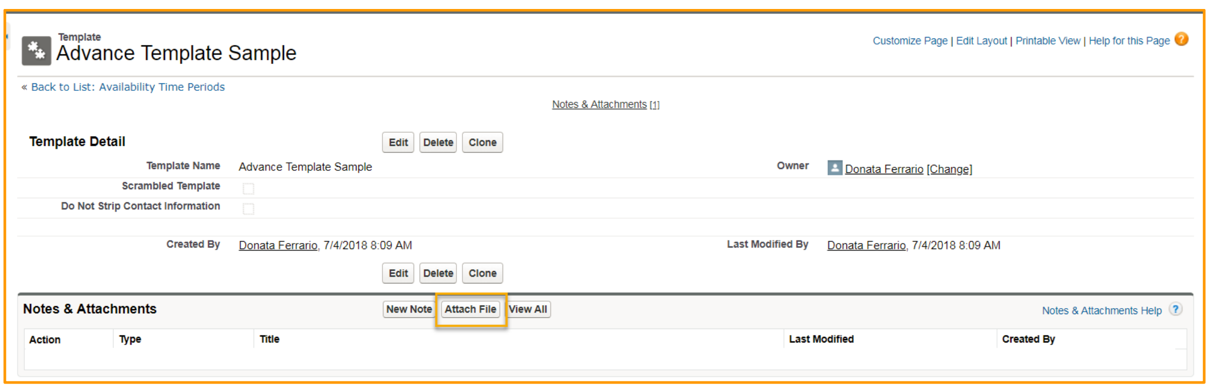


Diagram 8.2 Attach File

7. Select **Choose File** and choose the template you created.
8. Select **Attach File**.
9. Click **Done**.

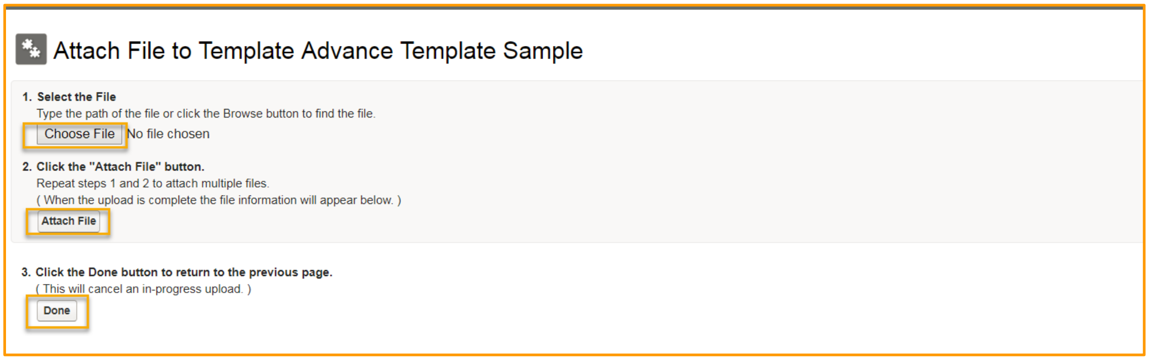


Diagram 8.3 Attach File

A few Notes on Templates

- Any Contact field (Talent Rover package field or Custom field) can be used in the template, except for the Address fields, due to the format of these Saleforce fields.
- Only fields from the Contact object can be referenced, no other object is supported.
- For Lighting users only, currently Talent Rover leverages 'Attachments' to create Templates. Attachments are not supported in Lighting, so make sure that the uploaded template has **File Type = File**, not File Type= Attachment.

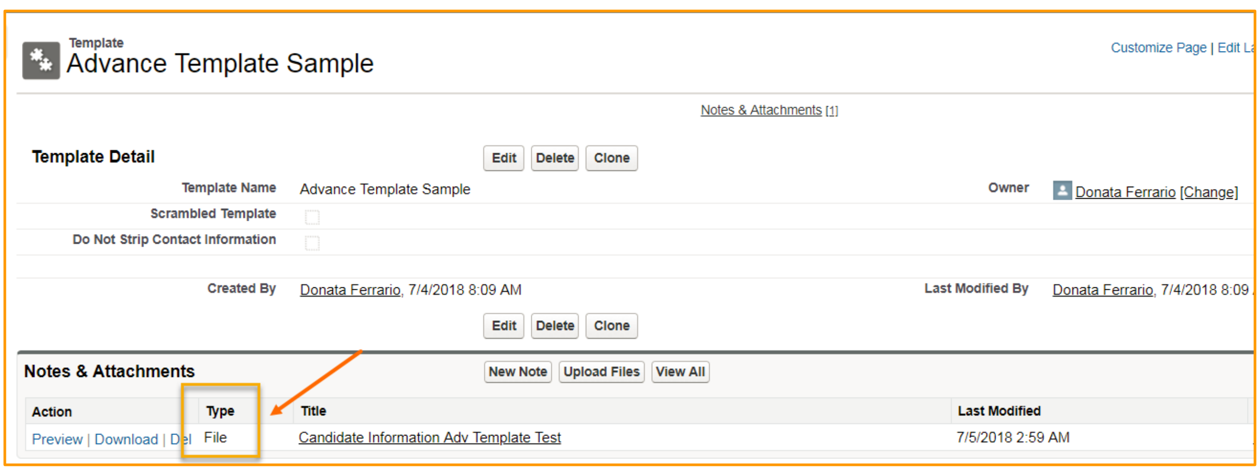


Diagram 9.1 Advance Template Sample

This occurs automatically if this checkbox is marked in your Lighting Org: **Setup** > **Salesforce Files** > **General Settings**: *Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments.*

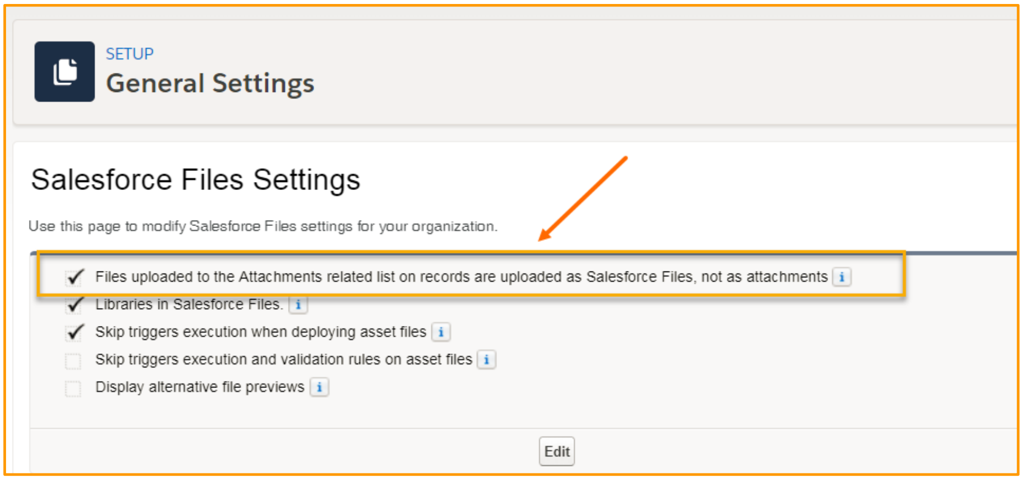


Diagram10.1 General Settings

Resume Formatter - Extra Options

The following are extra options that can be applied:

1. You can have a template that Does **Not** take off the personal details - mark the 'Do Not Strip Contact Information' checkbox on Template page layout.
2. You can have a template that encrypts the name of the Candidate when emailed to the client (via the Share button or email) - the name will also be scrambled in the attachment name. Mark the 'Scrambled Template' checkbox on Template page layout.

Note: This will not work if the Name is in the document's header.

To enable these functionalities:

1. Navigate to **All Tabs** >**Templates** > choose the name of your template.
2. You will see the two Checkboxes (pull them on the page layout if they are not already there).
   a. Do **Not** Strip Contact Information.
   b. Scrambled Template.

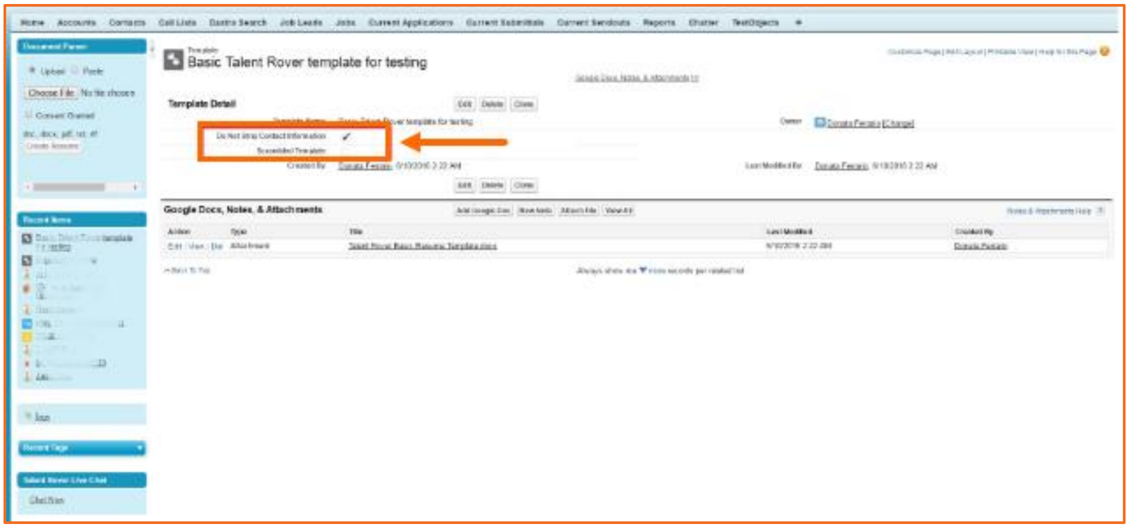


Diagram 11.1 Basic Talent Rover Template

Troubleshoot Resume Manager issues.

If Users report issues when using Document Editor, make sure all profiles have these permissions enabled:

- **Document Sessions**: Read Create Edit Delete
- **Push Topics**: Read Create Edit Delete
- **Template**: Read Create Edit Delete

If Users report issues when using the Template Formatter, make sure that:

- All profiles have the permissions listed above.
- Check that the affected user has access to the fields referenced in the template as merge fields (Navigate to **Profile** > **Field-Level Security** > **Object**: check that user has read/edit access to those fields).